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Memorandum

TO: BATA Oversight Committee

DATE: February 4, 2015

FR: Executive Director

W. I. 1253

RE: Contract Amendment – On-Call Design Services - FasTrak® Regional Customer Service Center Technical Assistance: Jacobs Engineering Group, Inc. (\$250,000)

This item would authorize a contract amendment with Jacobs Engineering Group, Inc. (Jacobs) to provide technical assistance for the FasTrak® Regional Customer Service Center (RCSC) project in an amount not to exceed \$250,000 for a period ending June 30, 2015. This item also provides a summary of the FasTrak® RCSC performance since the system upgrade and start of new operations contract on November 4, 2014.

Background

BATA is responsible for the operation of the FasTrak® RCSC, which provides customer account management; processing of BATA, Golden Gate Bridge Highway and Transportation District, and Express Lane toll transactions and violations; call answering; tag distribution; violation notice processing; payment processing; automatic credit card account replenishment; web site management; violation image review; customer correspondence; and the RCSC system maintenance. BATA entered into a contract in March 2013 with Xerox State and Local Solutions, Inc. (Xerox) to develop system upgrades and perform ongoing operation of RCSC through October 2019. The deployment of the new RCSC system occurred on November 4, 2014. Staff is targeting June 2015 to achieve system acceptance.

In January 2011 after a competitive procurement, this Committee authorized the Executive Director to enter into contracts with nine firms, including Jacobs, to provide on-call design services. Jacobs was selected to perform design services in the area of Intelligent Transportation Systems (ITS). In December 2012, this Committee authorized a contract amendment with Jacobs to assist with contract oversight of the RCSC vendor (Xerox), including assisting with design document review and system testing and data migration validation, as well as monitoring operations for the first six months of new RCSC operation (estimated to be through December 2014). The Committee also authorized an additional \$665,000 in June 2014 for increased resources to address additional deliverable and test review efforts and support for the oversight of the RCSC relocation.

The transition to the new RCSC system, deployed on November 4, 2014, has not gone well. Xerox experienced delays in some startup activities and required more time than expected to work off the transition backlog. Also, system issues and operational errors led to additional backlogs and poor customer service, such as long hold times for motorists calling the RCSC.

Although performance is improving and Xerox is clearing some of the processing backlogs, performance is still well below contract requirements and Xerox will be assessed financial penalties. Of the 45 performance requirements in the contract, Xerox did not meet 12 in November and five in December and will be assessed almost \$250,000 in penalties, representing a 7% deduction from the monthly invoices. Penalties will continue to be assessed each month and for any performance requirement that is not met in a consecutive month, the penalty assessment will compound (e.g. double in the second month, triple in the third month). An overview of the RCSC performance to date is included in Attachment A.

Staff has met with Xerox staff and executives and documented our concerns in writing. We have received a corrective action plan from Xerox that outlines its plan to get back into compliance with contract requirements by March. Xerox is addressing the issues by increasing the number of customer service representatives, conducting additional staff training, and prioritizing software fixes for high customer impact issues. Staff will continue to work with Xerox to ensure these actions are deployed and monitor data to ensure any other issues are identified and addressed quickly. If the performance does not improve, BATA is afforded further mechanisms under the contract to address non-performance.

In the meantime, to provide more resources for contractor oversight, strategize solutions with the contractor and conduct performance audits of the RCSC operations, staff is requesting approval to redirect the penalties deducted from the Xerox contract in the amount of \$250,000 for Jacobs to assist with these efforts through final system acceptance, anticipated to be in June 2015. During this extended transition and startup phase, Jacobs staff will provide increased oversight resources in addition to BATA staff in order to improve the customer services being delivered by Xerox. Jacobs is neither a small business nor a disadvantaged business enterprise and will not be subcontracting any of the work.

Recommendation

Staff recommends that the Committee authorize the Executive Director or his designee to negotiate and enter into a contract amendment with Jacobs in an amount not to exceed \$250,000 to provide technical assistance for the FasTrak[®] RCSC contract.


Steve Heminger

SH:bz

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BATA Oversight Committee

FasTrak® Performance and Operating System Status Update

February 11, 2015



METROPOLITAN
TRANSPORTATION
COMMISSION

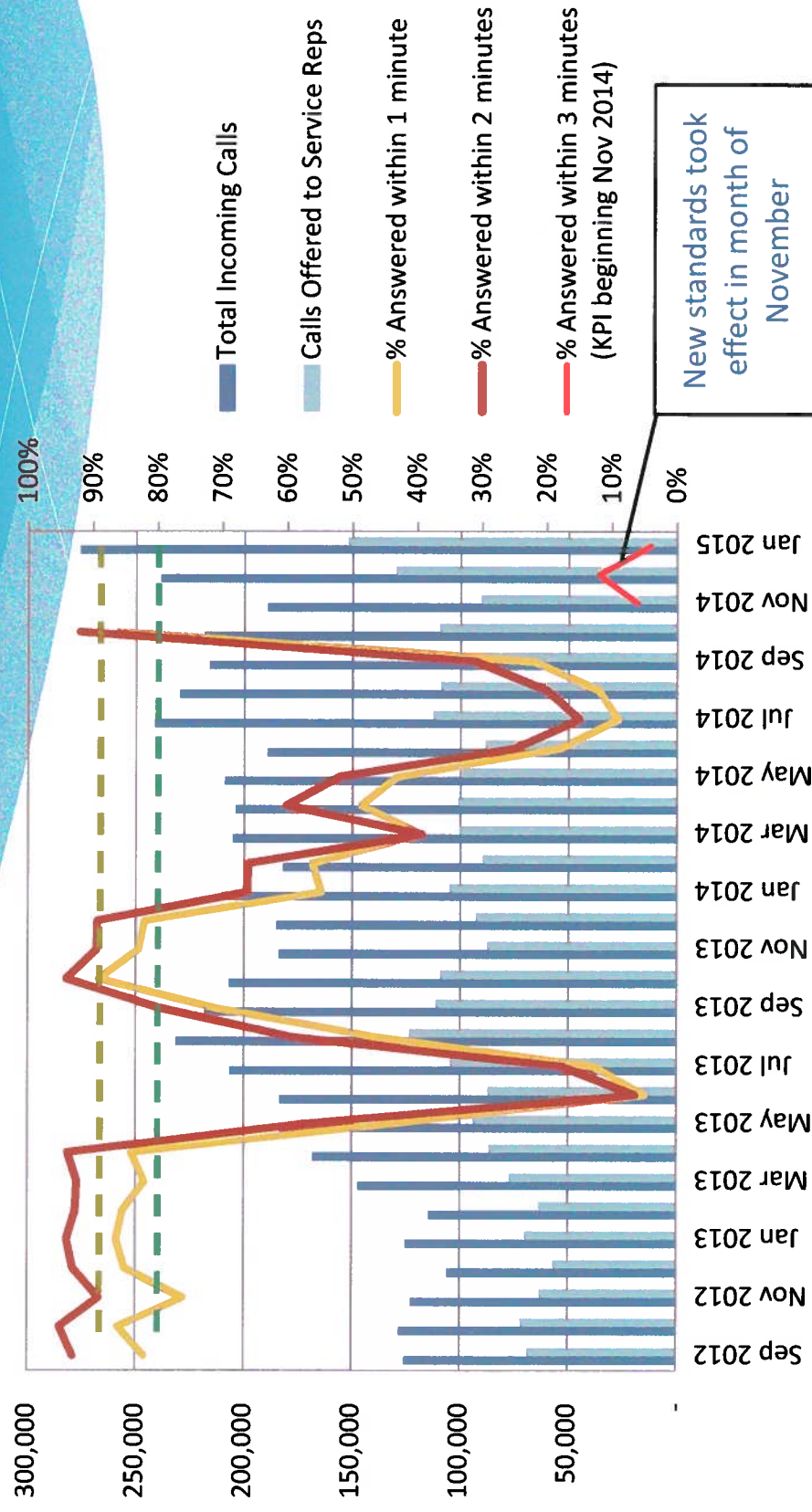
Benefits of Regional Customer Service Center System Upgrade

New system starts operation November 4, 2014

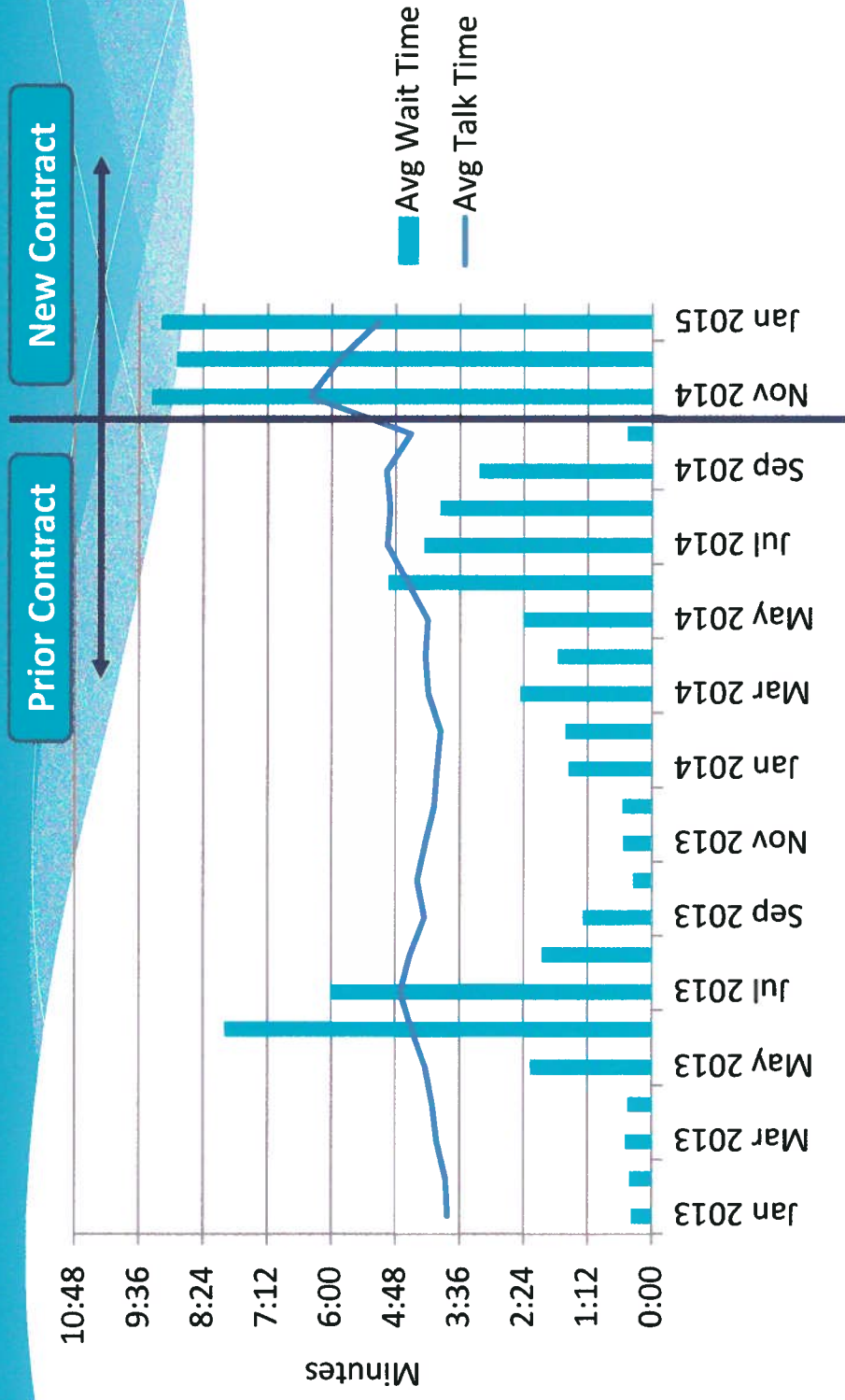
- Modern backend system
 - More stable
 - Fewer service outages
- New website
 - Streamlined navigation
 - Faster response times
- Full disaster recovery backup system
- More robust phone system can handle higher volumes
- New service request tracking system
- Stronger key performance indicators (KPIs) to enforce contract

Call Answering Performance

September 2012 to January 2015

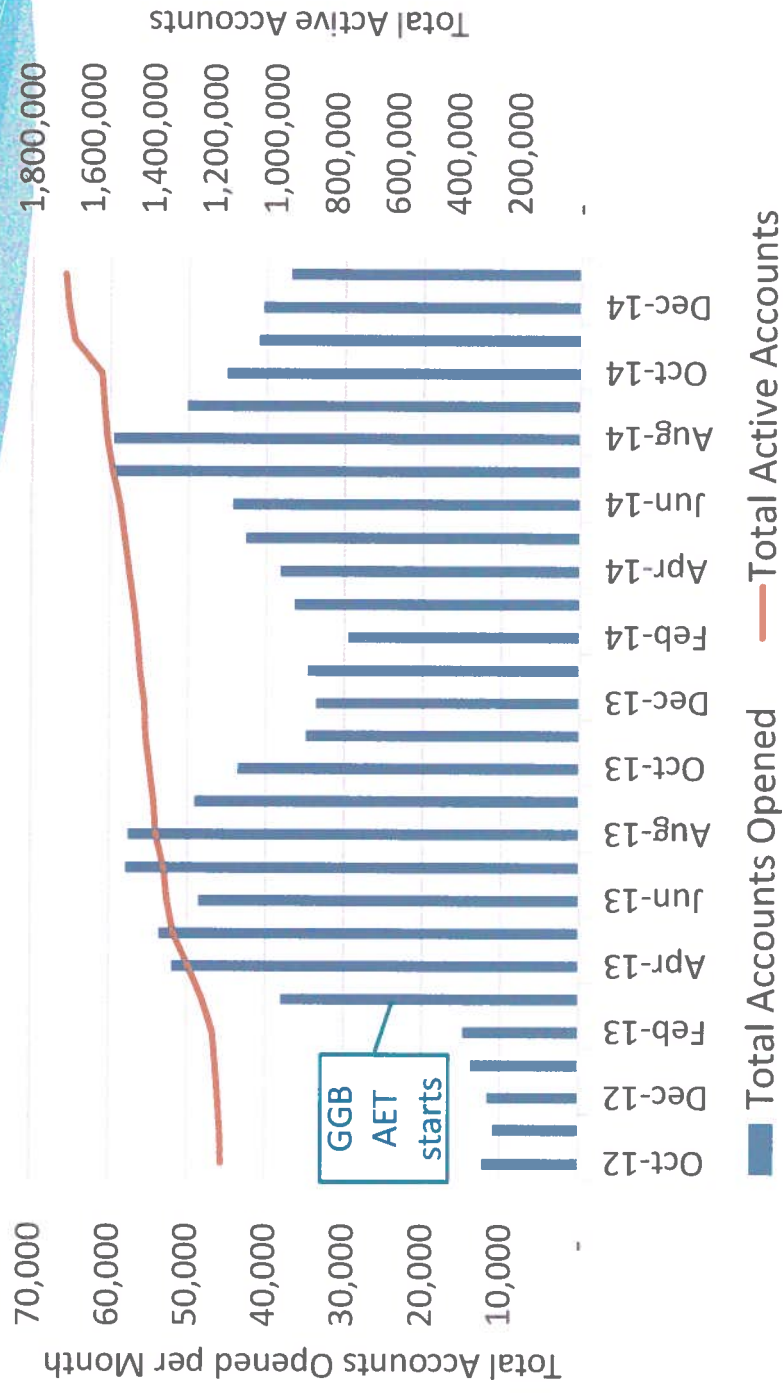


Call Wait Time & Talk Time



New Account Activity

October 2012 - January 2015



Issues Affecting Regional Customer Service Center Operations

- High volume of incoming correspondence; responses backlogged by over a month
- Incorrect deployment of some business rules that customers are accustomed to
- Customer Service Representatives not familiar with new system navigation
- Delays in providing operations and financial reports

Corrective Actions

- Increase number of Customer Service Representatives
 - Deployed overflow call center in Houston with dedicated CSRs
 - Current call staff 82 in San Francisco and 10 in Houston
 - Plan to hire 20 additional CSRs until back in compliance with standards
- Hire night shift to clear backlogged correspondence
- Additional CSR training to reduce call length
- Prioritize fixes for high customer impact issues
- Target end of March to be in compliance with standards



Thank You

REQUEST FOR COMMITTEE APPROVAL
Summary of Proposed Contract Amendment

Work Item No.:	1253
Contractor:	Jacobs Engineering Group, Inc., San Francisco, CA
Work Project Title:	FasTrak® Regional Customer Service Center (RCSC) Technical Assistance
Purpose of Project:	Contract Oversight Assistance for RCSC
Brief Scope of Work:	Provide technical assistance for implementation of RCSC contract including reviewing design documents, validation of testing, and operations monitoring, system acceptance and transition to temporary location
Project Cost Not to Exceed:	This amendment - \$250,000 Current contract amount before this amendment - \$3,055,000 Maximum contract amount after this amendment - \$3,305,000
Funding Source:	Toll Bridge Rehabilitation Program Budget
Fiscal Impact:	Funds are included in the Toll Bridge Rehabilitation Program Budget for FY 2014-15.
Motion by Committee:	That the Executive Director or his designee is authorized to negotiate and enter into a contract amendment with Jacobs Engineering Group, Inc. for RCSC technical assistance as described above and in the Executive Director's Memorandum dated February 4, 2015, and the Chief Financial Officer is directed to set aside funds in the amount of \$250,000 for such contract amendment.
BATA Oversight Committee:	<hr/> Tom Bates, Vice Chair
Approved:	Date: February 11, 2015